



**Indiana Pro Bono Commission**  
**One Indiana Square, Suite 530**  
**Indianapolis, IN 46204**

**Indiana Bar Foundation**  
**230 East Ohio Street, Suite 200**  
**Indianapolis, IN 46204**

## **COMBINED 2005 DISTRICT REPORT, 2007 PRO BONO GRANT APPLICATION, AND 2007 PLAN**

**Pro Bono District:** Five

**Applicant:** District Five Pro Bono Committee

**Mailing Address:** c/o Edward W. Stachowicz, Indiana Legal Services, Inc., PO Box 1455

**City:** Lafayette, IN 47902 **Phone:** 765-423-5327 **Fax:** 765-423-2252

**E-mail address:** ed.stachowicz@ilsa.net

**Judicial Appointee:** Honorable Thomas Perrone, Cass Superior Court 1

**Plan Administrator:** Edward W. Stachowicz, Managing Attorney, Indiana Legal Services, Inc.

**Names of Counties served:** Cass, Fulton, Howard, Miami, Tipton and Wabash

**Percentage of volunteer attorneys (as defined on page 3) who accepted a pro bono case in 2005 per registered attorneys in district, i.e. the district's pro bono participation rate To the extent the pro bono participation rate information is available by county, please provide below.**

<b>Number of registered attorneys in county:</b>		<b>Percentage of volunteer attorneys who accepted a pro bono case in 2005 per registered attorneys in county:</b>	
Cass	43	Cass	4.65%
Fulton	5	Fulton	20.0%
Howard	97	Howard	0.00%
Miami	24	Miami	12.5%
Tipton	16	Tipton	0.00%
Wabash	29	Wabash	3.44%
<i>Total in district</i>	<i>224</i>	<i>Total in district</i>	<i>4.00%</i>

**Number of potential clients requesting help in 2005 (limit this to actual intake done or sessions in which plan administrator or his/her delegate provided more than minimal assistance):** Approximately 20% of the 30 – 40 intake done by ILSI in District V Counties are considered for pro bono referrals. Those not able to be referred are often given advice about their problem by ILSI staff attorneys.

**Amount of grant received for 2006:** \$11,000

**Amount of grant (2006 & prior years) projected to be unused as of 12/31/06:** \$0

**Amount requested for 2007:** \$51,900

## 2007 PLAN SUMMARY

- 1. Please write a brief summary of the 2007 grant request. Please include information regarding your districts planned activities including committee meetings, training, attorney recognition, newspaper or magazine articles, marketing and promotion. The grant request should cover needs to be addressed, methods, target audience, anticipated outcomes, and how past difficulties will be addressed.**

**Hiring Full-Time Plan Administrator:** Previously District Five used IOLTA funds to support the part-time Hispanic Outreach Paralegal instead of hiring a Plan Administrator, as Indiana Legal Services Staff performed the duties of the Plan Administrator. With the anticipated increase in the availability of funding in 2007, the Committee plans to not continue the part-time Hispanic Outreach Paralegal position, which was shared with District Four, and instead plans to hire a full-time Plan administrator. The District's ability to fully implement 2007 goals and objectives will be greatly enhanced with the hiring of the new full-time Plan Administrator. The Plan Administrator will be a paralegal level position and Hispanic outreach efforts will continue.

**Attorney Recruitment and Recognition:** Recruitment of additional pro bono attorneys continues to be a high priority for the Committee. In 2007 committee members will continue personal efforts to recruit new pro bono attorneys. CLE programs will be sponsored throughout the District to recruit new pro bono attorneys. Recognition events will be held in each county to publicly recognize pro bono attorneys.

**Increasing Number of Pro Bono Cases:** The Committee anticipates its goal of referring two (2) cases to each pro bono attorney in 2007 will be achievable with the hiring of the new full-time Plan Administrator.

**Howard County Legal Aid:** Organized by the Howard County Bar Association, Howard County Legal Aid ("HCLA") has a long history of serving the legal needs of low-income individuals in Howard County. The Committee will continue working with HCLA in an effort to quantify the number of cases handled and the number of hours donated by HCLA pro bono attorneys.

**Community Legal Education/Outreach Programs:** Coordinated by the Plan Administrator, one community legal education program will be held in each county utilizing pro bono attorneys as speakers on topics of local community interest. Building on previous effort by the Hispanic Outreach paralegal, additional community education programs will also target the legal needs of the Spanish speaking communities in District Five.

**Local Intake and Talk to a Lawyer Programs:** The Plan Administrator will regularly travel to District Five counties to conduct face-to-face intake. Committee members will continue to explore with their local Bar Associations the establishment of regular talk to a lawyer programs staffed on a rotating basis by pro bono attorneys to meet with prospective clients for legal advice, representation, or assistance with pro se filings.

**Pro Se Activities:** Efforts will continue to seek the cooperation of Courts and Clerks in each county to facilitate access to and use of pro se materials by pro se litigants. Pro bono attorneys participating in talk to a lawyer programs mentioned above will be available to assist pro se litigants.

**Client Intake, Eligibility Screening, Case Referral, and Administration:** Indiana Legal Services will conduct client intake, eligibility screening, case referral, provide office space, receptionist support, staff supervision and other administrative responsibilities, including malpractice insurance for participating attorneys, handling District funds, record keeping and statistical reporting.

## 2005 REPORT OF VOLUNTEER ATTORNEY CASES IN DISTRICT FIVE

Please attach additional pages for each pro bono provider that receives IOLTA funding, whether directly or indirectly, in your district. See the sample additional pro bono provider page 3A. Please list each attorney only once in the volunteer attorney column but complete one line for each pro bono case for that attorney.

### Definitions

Case: A legal matter referred to and accepted by a pro bono attorney volunteer. This includes mediation and GAL services.

Volunteer Attorney: An attorney who has rendered pro bono service to at least one low-income client during the year or accepted a pro bono referral from the identified program. This does not include attorneys who are on the list of pro bono volunteers but who have never taken a case. The case numbers do not include cases screened, only cases actually referred to a pro bono attorney. This also includes an attorney who has worked solely on a pending pro bono case that was neither opened nor closed during the reporting year.

Case Type: Please use the abbreviations listed in Indiana Supreme Court Administrative Rule 8(B)(3) or any other defined abbreviation.

**Name of Pro Bono Provider** (includes legal service provider, court, plan administrator, bar association, and other organizations): Wabash Valley Volunteer Attorneys

**IOLTA funding accounts for 100% of total pro bono provider budget. Please state the percentage of volunteers and cases which are attributable to IOLTA funding 100%. If this percentage is substantially more than the percentage of IOLTA funding, please explain.**

Volunteer Attorney Name	County	Number of new cases accepted/opened in 2005	Number of cases closed in 2005	Number of cases pending in 2005 that were neither opened nor closed in 2005	Number of hours for cases closed in 2005 (column 4)	Case Type
<b>Albert Schlitt</b>	<b>Wabash</b>	<b>9</b>	<b>8</b>		<b>3.0</b>	<b>Incorporation</b>
	<b>Wabash</b>				<b>2.3</b>	<b>Eviction</b>
	<b>Wabash</b>				<b>.5</b>	<b>Incorporation</b>
	<b>Wabash</b>				<b>4.5</b>	<b>Real Estate</b>
	<b>Wabash</b>				<b>21.0</b>	<b>Divorce</b>
	<b>Wabash</b>				<b>11.1</b>	<b>Custody</b>
	<b>Wabash</b>				<b>2.0</b>	<b>Incorporation</b>
	<b>Wabash</b>				<b>1.0</b>	<b>Will</b>
	<b>Wabash</b>					<b>Custody</b>
<b>Jon Myers</b>	<b>Cass</b>	<b>1</b>	<b>1</b>		<b>24.0</b>	<b>Incorporation</b>
<b>T. Andrew Perkins</b>	<b>Fulton</b>	<b>3</b>	<b>2</b>		<b>2.25</b>	<b>Child Support</b>
	<b>Fulton</b>				<b>2.75</b>	<b>Divorce</b>
	<b>Fulton</b>				<b>2.75</b>	<b>Utilities</b>
<b>Alan Burke</b>	<b>Fulton</b>			<b>1</b>		<b>Guardianship</b>
<b>Greg Heller</b>	<b>Fulton</b>			<b>1</b>		<b>Custody</b>
<b>SUBTOTAL: 5</b>	<i>No total needed</i>	<b>SUBTOTAL: 13</b>	<b>SUBTOTAL: 11</b>	<b>SUBTOTAL: 2</b>	<b>SUBTOTAL: 77.15</b>	<i>No total needed</i>

**Name of Pro Bono Provider** (includes legal service provider, court, plan administrator, bar association, and other organizations): Wabash Valley Volunteer Attorneys

**IOLTA funding accounts for 100% of total pro bono provider budget. Please state the percentage of volunteers and cases which are attributable to IOLTA funding 100%. If this percentage is substantially more than the percentage of IOLTA funding, please explain.** **ex-**

Volunteer Attorney Name	County	Number of new cases accepted/opened in 2005	Number of cases closed in 2005	Number of cases pending in 2005 that were neither opened nor closed in 2005	Number of Hours for cases closed in 2005 (column 4)	Case Type
<b>Jay Hirschauer</b>	<b>Cass</b>	<b>3</b>	<b>1</b>			<b>Divorce</b>
	<b>Cass</b>					<b>Divorce</b>
	<b>Cass</b>				<b>10.89</b>	<b>Custody</b>
<b>Bruce Embrey</b>	<b>Miami</b>	<b>1</b>				<b>Divorce</b>
<b>Elizabeth Price</b>	<b>Miami</b>	<b>1</b>	<b>1</b>		<b>18.1</b>	<b>Divorce</b>
<b>Patrick Roberts</b>	<b>Miami</b>	<b>1</b>	<b>1</b>		<b>1.75</b>	<b>Divorce</b>
<b>SUBTOTAL:</b>		<b>SUBTOTAL:</b>	<b>SUBTOTAL:</b>	<b>SUBTOTAL:</b>	<b>SUBTOTAL:</b>	
<b>3</b>		<b>6</b>	<b>3</b>	<b>0</b>	<b>30.74</b>	
<b>TOTAL: 8</b>	No total needed	<b>TOTAL: 19</b>	<b>TOTAL: 14</b>	<b>TOTAL: 2</b>	<b>TOTAL: 107.89</b>	No total needed



<b>2005 REPORT</b>
--------------------

**Please list your District's 2005 activities--including committee meetings, training, attorney recognition, newspaper or magazine articles, marketing and promotion--in chronological order.**

<b><u>Date</u></b>	<b><u>Activity</u></b>
1/19/2005	District Five Pro Bono Meeting, Peru, Indiana
3/9/2005	District Five Pro Bono Committee meeting, Peru, Indiana
4/22/2005	Introduction to Pro Bono Law CLE sponsored by the District Five Pro Bono Committee, Kokomo, Indiana (6 hours plus 1 hour ethics)
5/4/2005	District Five Pro Bono Committee Meeting, Peru, Indiana
6/15/2005	District Five Pro Bono Committee Meeting, Peru, Indiana
9/22/2005	District Five presentation to Indiana Pro Bono Commission g by Ed Stachowicz
10/22/2005	Pro Bono Plan Administrator Retreat attended by Ed Stachowicz
10/5/2005	District Five Pro Bono Committee Meeting, Peru, Indiana
12/7/2005	District Five Pro Bono Committee Meeting, Peru, Indiana

## 2005 REPORT

**Please provide a short summary of how the provision of pro bono service is coordinated in your district, including the intake process, the relationships of pro bono providers in the district, how referrals are made, and how reporting is done.**

The Lafayette Indiana Legal Services, Inc. (“ILSI”) office coordinates Community Volunteer Lawyer Panels in Cass, Fulton, Miami, Tipton and Wabash Counties. ILSI conducts intake, screens for eligibility and refers cases to panel members. ILSI periodically monitors case progress including hours spent, offers malpractice insurance, and litigation expense support when requested. Panel members contacted directly by potential clients can refer clients to ILSI for a referral back to the panel member. Non-panel member attorneys providing pro bono services outside the CVLP are encouraged to use simple self-reporting forms provided by the District to report cases and hours donated.

Howard County has maintained a separate program, Howard County Legal Aid (“HCLA”). Approximately 20 attorneys participate by taking two (2) days each year and meet with potential legal aid clients on the last three (3) Tuesdays of each month. The Lafayette ILSI office refers significant numbers of callers from Howard County to HCLA. The Committee has provided self-reporting forms for use by HCLA pro bono attorneys; however most are generally reluctant to use the forms citing additional administrative burdens. In his June 29, 2006 letter to Monica Fennell, Executive Director of the Indiana Pro Bono Commission, Brent Dechert, HCLA coordinator, confirms the general reluctance to use even the reporting forms HCLA provides. Mr. Dechert estimates that each of the 20 participating HCLA pro bono attorneys opens approximately 24 cases each year. (Please see attached June 29, 2006 letter from Mr. Dechert, Page 9A)

**Please describe any special circumstances, including difficulties encountered, affecting your District’s 2005 implementation of its plan.**

The committee had hoped to be able to report the considerable amount of pro bono activity that the committee knows is being provided by many attorneys in District V outside of the ILSI administered Community Volunteer Lawyers Panels by way of the self-reporting mechanism publicized by the committee throughout District V over the last three years. The response has not been as great as hoped. The committee will continue efforts to encourage self-reporting. Howard County Legal Aid continues to provide considerable pro bono service, but the membership remains steadfast in its desire to maintain its independence and minimize administrative record keeping. The District was not able to obtain and report any self-reporting forms from HCLA pro bono attorneys as was the case in 2004, and therefore the cases reported is significantly lower in 2005 than 2004.

The demands of other responsibilities (Office Manager and Volunteer Intake Coordinator) and a three (3) month maternity leave of the ILSI Pro Bono Coordinator, Jennifer Miller, made it difficult to coordinate the community education programs and the Continuing Legal Education program District Five had wanted to sponsor in 2005. Pro bono attorney recognition events also could not be coordinated.

**DISTRICT FIVE BUDGETS for 2005, 2006 and 2007**

Income Category	2005 Actual Income	2005 Budget	2006 Actual Income To Date	2006 Budget	2007 Budget
<b>A. INCOME</b>					
1. IOLTA Grant Amount	11,000	11,000	11,000	11,000	51,900
Other Income: <i>Explain source(s) and if Actual/Expected in narrative</i>					
2. Previous year carry over	4,533	4,533	4,065	4,065	
3.					
4.					
5. Total Income (sum of lines A1 - A4)	\$ 15,533	\$ 15,533	\$ 15,065	\$ 15,065	\$ 51,900
Expense Category	2005 Actual Expenditures	2005 Budget	2006 Actual Expenditures To Date	2006 Budget	2007 Budget
<b>B. PERSONNEL EXPENSES</b>					
1. Plan Administrator					26,280
2. Paralegals	3,456	3,750	1,924	3,750	
3. Others - <b>Please explain</b>					
4. Employee benefits					
a. Insurance	2,622	2,738	1,224	2,450	10,320
b. Retirement plans					
c. Other - <b>Please explain</b>					
5. Total Personnel Expenses (sum of lines B1 - B4c)	\$ 6,078	\$ 6,488	\$ 3,148	\$ 6,200	\$ 36,600
<b>C. NON-PERSONNEL EXPENSES</b>					
1. Occupancy					2,600
2. Equipment Rental					200
3. Office Supplies					300
4. Telephone					1,400
5. Travel					1,800
6. Training	190	400	150	400	400
7. Library					300
8. Malpractice Insurance	200	200	500	500	500
9. Dues and Fees					300
10. Contingent Reserve					
11. Litigation Reserve					
12. Marketing and promotion		1,245		1,115	1,000
13. Attorney recognition		150		150	2,400
14. Litigation Expenses		500		500	2,000
15. Property Acquisition					1,500
16. Contract Services to ILSI	5,000	5,000	5,000	5,000	
17. Grants to other pro bono providers					
18. Other - Educational Materials		\$ 1,550		\$ 1,200	600
19. Total Non-Personnel Expenditures (sum of lines C1 - C18)	\$ 5,390	\$ 9,045	\$ 5,650	\$ 8,865	\$ 15,300
<b>D. TOTAL EXPENDITURES</b> (sum of B5 & C19)	\$ 11,468	\$ 15,533	\$ 8,798	\$ 15,065	\$ 51,900
<b>E. ENDING FUND BALANCE</b> (A5 less D)	\$ 4,065	\$ -	\$ 6,267	\$ -	\$ -



## **Budget Narrative**

Please provide descriptions of the following line items in the foregoing budget chart, by item number, in the space provided. Please explain any other budget entries that are not self-explanatory, including other sources of income.

**Lines (B)(1), (2), (3), (4)** Please indicate the number of hours per week for each personnel position, rate of pay, and all employee benefits.

B1) Full-time paralegal – 37.5 hours per week at \$24,406 base with health, life and disability insurance

B(4)(a) – health, life and disability insurance for Plan Administrator

**Line (C)(1)** Please describe the occupancy cost in terms of square footage, utilities or other amenities and indicate whether the occupancy cost is above or below the market rate for that space.

Occupancy cost is approximately \$10.80 per square foot and is average for downtown Lafayette based on distance from Courthouse. Utilities are calculated on approximately 5% of total building utility cost to ILSI.

<b>ANNUAL TIMETABLE FOR SUBMISSION OF FORMS AND CHECKS:</b>
---

January 1:	Checks distributed
July 1:	Annual report, plan and grant application due to IPBC
November:	Notification of awards
<b>December 1:</b>	<b>IBF grant agreement due and revised budget due</b>